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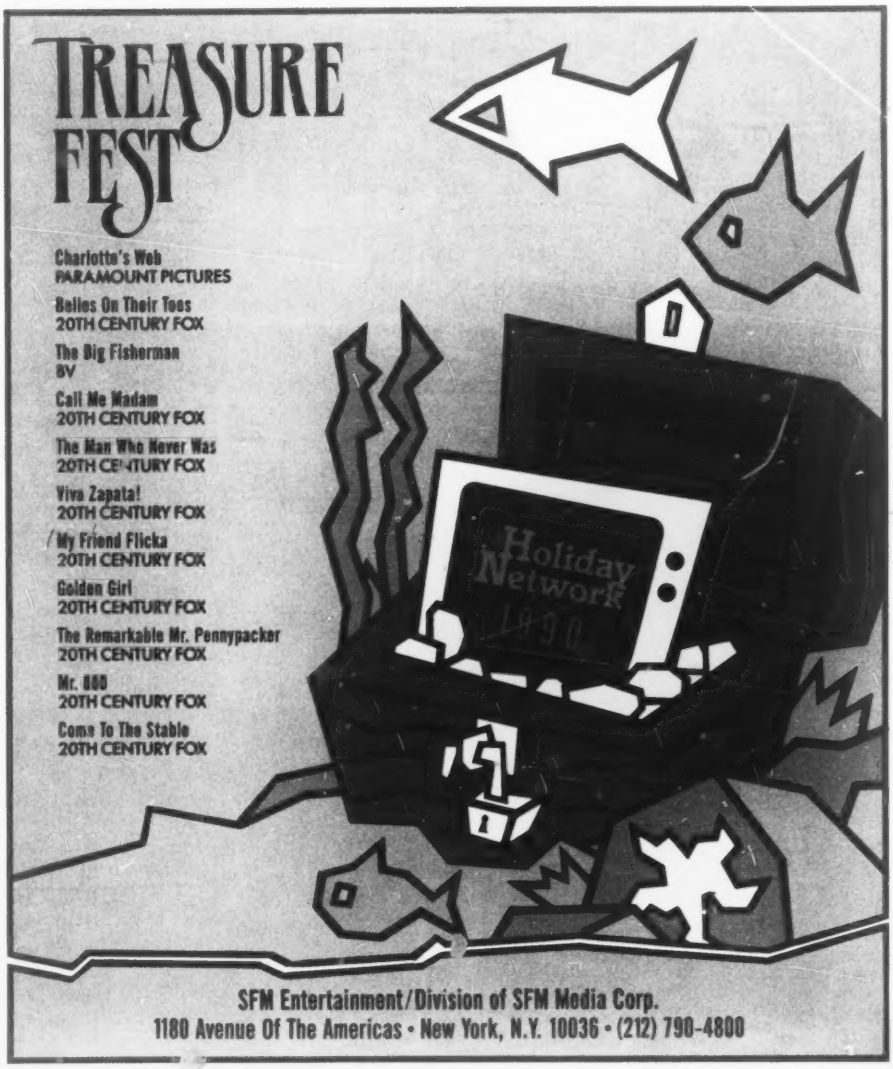
The Fifth Estate

RADIO TELEVISION CABLE SATELLITE

Broadcasting Jul 17



58th Year 1989

Congressional search for revenue puts broadcasters on defensive

Broadcasting Jul17

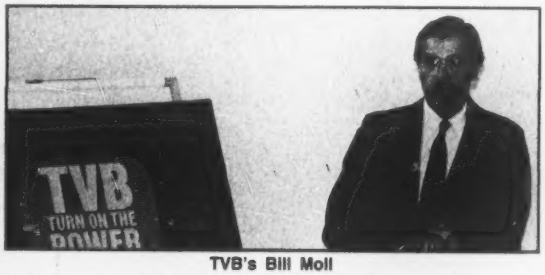
Vol. 117 No. 3

Fairness doctrine showdown...

In effort to put fairness doctrine into law, House Commerce Committee Chairman John Dingell includes it in budget reconciliation bill, move seen to prevent Bush veto; bill also includes new revenue generating measures affecting broadcasters and cable. **PAGE 27.**

TVB sells 'free TV' to advertisers...

Television Bureau of Advertising's "Turn on the Power" campaign seeks



TVB's Bill Moll

to increase ad revenue by improving image of broadcast television's effectiveness. **PAGE 29.**

Satellites: the future now...

Series of contracts signed since January have already made 1989 year of satellite space rush, as TV and radio programers put down cash to insure current satellites are replaced in next five years. BROADCASTING's special report includes look at those deals shaping future, as well as key role of business TV, fiber optic challenge, report on European DBS and more. **PAGES 35-59.**

Artist's rendition of GE satellite

27/ **NO DEAL**
National Association of Broadcasters and National Cable Television Association reach proposed compromise on must carry, but objections by Association of Independent Television Stations sends groups back to square one.

66/ **FUGITIVE NET**
Reality programs such as Orion's *Crimewatch Tonight*,

which debuts in syndication next fall, help police apprehend suspects.

30/ **LAWYERS BOUGHT**
Lifetime strikes deal with 20th Century Fox Syndication to carry off-network reruns of *L.A. Law* for five years starting in September 1990.

31/ **ALL NEWS**
Walt Disney Co.'s KHJ-TV Los Angeles, going all-news in prime time in 1990, hires veteran KABC-TV Los Angeles news anchor Jerry Dunphy.

33/ **NUMBER CRUNCHING**
Just-released spring 1989 Arbitron ratings show CHR as top format in top two markets.

59/ **GETTING TOUGH**
ATS Committee Chairman Richard Wiley tells HDTV proponents they will be held to deadlines for submitting equipment test results.

62/ **LIMITED POWER**
FCC increases Class A FM power to 6 kw but limits number of stations that can use new maximum power.

65/ **TWO YEARS AND COUNTING**
Fox Broadcasting celebrates its second year with its highest rated show yet—controversial *Totally Hidden Video*.

68/ **UNCOUNTED AUDIENCE**
A.C. Nielsen agrees to conduct measurement of "out-of-home viewers"—audience missed by usual tracking methods.

75/ **CABLE UP FRONT**
Cable advertising upfront market is expected to generate $400 million—double that of year ago.

95/ **MISTER FINANCE**
With help of Julian Brodsky's financial expertise, Comcast Corp. has grown from cable system in Tupelo, Miss., to one of five biggest MSO's in country.

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Compulsory License

FCC has voted to recommend to Congress that it abolish 13-year-old compulsory copyright license for local as well as distant signals, saying move would benefit consumers, broadcasters and cable programing services.

What Congress will do is unknown. Politics are complicated by fact that some broadcasters want to do away with license for local signals and require cable systems to pay broadcasters. National Association of Broadcasters has formed committee to explore possibility of creating new copyright scheme that includes retransmission fee and carriage requirements for local signals (BROADCASTING, June 19 and 26).

On Jan. 3, House Telecommunications Subcommittee member John Bryant (D-Tex.) reintroduced bill he offered in last Congress (BROADCASTING, April 4, 1988) to condition license on carriage. Senate Copyright Subcommittee Chairman Dennis DeConcini (D-Ariz.) revived measure from last Congress that is virtually identical to Bryant's bill.

Crossownership

Telco-cable—FCC has tentative plans to hold en banc hearing on telco-cable issue. Agency initiated debate on whether telcos should be allowed to provide cable services in July 1988 when it tentatively voted 2-1 to recommend Congress lift telco-cable crossownership ban.

Senator Al Gore (D-Tenn.) has introduced bill lifting crossownership prohibition; companion measure was offered in House by Rick Boucher (D-Va.).

FCC may not be able to affirm decision. Commissioner James Quello issued statement Jan. 13, saying he was reconsidering vote favoring repeal. And Commissioner Patricia Diaz Dennis, who voted against "tentative conclusion," continues to feel ban against telcos controlling programing should be retained, although she believes telcos should be allowed to offer video transmission services as common carriers.

FCC move follows National Telecommunications and Information Administration report on cable TV regulation recommending telephone companies be allowed to serve as transporters of others' programing, although not as programers themselves, in telcos' own service areas (BROADCASTING, June 20, 1988).

At present, barriers to such BOC crossownership include not only FCC regulations and 1984 Cable Act but also modified final judgment issued by U.S. Judge Harold Greene in his supervision of breakup of AT&T. NTIA has petitioned FCC to preempt Greene's regulation of BOC's, arguing that judge is hampering their entry into information services, including cable.

Duopoly, one-to-a-market—FCC voted Oct. 27, 1988, to relax duopoly rules to allow closer spacing of commonly owned AM and FM stations, arguing that impact on diversity would be negligible and that it let some broadcasters reap certain economies of scale.

Using same justification, FCC relaxed policy for waivers to one-to-a-market rules Dec. 12, 1988, saying it would look favorably on waiver requests involving top 25 markets with at least 30 broadcast "voices."

Broadcast-newspaper—Appropriations bill (H.R. 4782), which was signed into law, includes provision that prevents FCC from reexamining its broadcast-newspaper crossownership rules.

Direct Broadcast Satellites

■ Making new round of assignments in separate orbital arc was to be on FCC agenda late last week with proposal to split permits into two assignments, one east, one west, likely component. Due to spectrum shortage and concentration of requests in only four of eight positions, FCC has said such paired assignments may be necessary to achieve efficient use of spectrum. Slight majority of comments on proposal last January approved idea.

Calling high-power direct-to-home broadcast satellites (DBS) "dead horse" in U.S., former Hughes Communications president and White House telecommunications expert Clay (Tom) Whitehead said in June 1989 that his company, Orbital Broadcasting, withdrew its application to launch DBS because neither Hollywood nor broadcast networks appear willing to "bypass the increasing MSO bottleneck."

Permittees and applicants to launch "true" high-power (200 watt) DBS believe Ku-band birds 10 times more powerful than average C-band birds would mean direct-to-home television reception via downlinks one-tenth size of average C-band dishes. Smaller, more affordable dishes (one meter or smaller in diameter) would then theoretically lead to home satellite market several times size of current two million C-band consumer base. Large and small companies have failed since early 1980's, however, to get high-power Ku-band DBS off ground.

Among applicants proposing to launch services as early as 1992 are Hughes Communications, operator of two C-band cable programing satellites, top cable operator Tele-Communications Inc., through subsidiary Tempo Enterprises, and group broadcaster Hubbard Broadcasting.

Indecency

■ Senate has adopted legislation targeting violent, sexually explicit and drug-related programing. Measure would waive antitrust restrictions to permit broadcasters, cablecasters and programers to get together to self-regulate. House Judiciary Committee

BY THE NUMBERS

Summary of broadcasting and cable

BROADCASTING

SERVICE	ON AIR	CP's [1]	TOTAL *
Commercial AM	4,953	263	5,216
Commercial FM	4,200	733	4,933
Educational FM	1,393	255	1,648
■ Total Radio	10,546	1,251	11,797
FM translators	1,728	341	2,069
Commercial VHF TV	547	23	570
Commercial UHF TV	524	215	739
Educational VHF TV	122	5	127
Educational UHF TV	218	27	245
■ Total TV	1,411	370	1,681
VHF LPTV	300	205	505
UHF LPTV	324	1,508	1,832
■ Total LPTV	624	1,713	2,337
VHF translators	2,722	121	2,843
UHF translators	2,133	443	2,576

CABLE†

Total subscribers	49,538,000
Homes passed	73,900,000
Total systems	8,000
Household penetration†	54.8%
Pay cable penetration	32%

* Includes off-air licenses. † Penetration percentages are of TV household universe of 90.4 million. [1] Construction permit. [2] Instructional TV fixed service. [3] Studio-transmitter link.

ings" with PBS and NAPTS following its July 17-18 board meeting. Meetings are intended to unify plan to streamline national public TV programing processes. CPB so far has taken issue with elements of NAPTS plan that would create chief programing executive at PBS with centralized authority over approximately 25% of national programing funds, including most of current CPB Program Fund. CPB must report to Congress next January on national program funding efficiency.

Garrison Keillor will return to American Public Radio Sept. 30 with new Saturday evening series, he announced at Annual Public Radio Conference in San Francisco, May 17-21. National Public Radio, which launched July 1 hourly newscasts, held board meeting July 13 and 14 to consider its capital budget and strategic plan for 1990's.

CPB asked House April 18 and Senate March 17 to provide full $265 million authorized for fiscal 1992, plus remainder of $200 million authorized for replacement of satellite due to expire in 1991. Administration has recommended capping CPB at 1991 figure of $242 million and would also stop funding satellite replacement project at amount already appropriated for 1990, $56.8 million. CPB board has adopted $254,339,038 FY 1990 budget.

CPB Chairman Kenneth Towery also asked Congress March 21 to remove CPB from Inspector General Act, citing concerns that First Amendment rights of public broadcasters could be threatened by inspector general's authority to deem programing or other budget items unnecessary. In meantime, however, CPB has appointed acting IG.

Syndex

FCC put off effective date of its new syndex rules from Aug. 18, 1988, to Jan. 1, 1990, but it otherwise kept rules much as they were when adopted last year. Broadcasters desiring syndex protection had to notify cable system by June 19.

Rules empower broadcasters to enforce exclusivity of programs against cable systems that import duplicative programing on distant broadcast signals.

Real delay in implementation of rules may come as result of court appeals likely to be made by cable operators and satellite carriers who distribute distant signals threatened by syndex. If court stays rules pending resolution of appeals, implementation of rules may be delayed two or three years. If court finds fault with them, they may never go into effect.

United Video, carrier of superstations WGN-TV Chicago, WPIX(TV) New York and KTVT-TV Dallas, Texas Cable Television Association, United Cable Television and Century Communications have challenged rules in U.S. Court of Appeals. They have also asked FCC to stay rules pending court review. Representative Bill Richardson (D-N.M.) has introduced legislation that would delay implementation date of FCC's syndex rule for one year (BROADCASTING, July 3).

TV Marti

■ Backers of Radio Marti, which broadcasts news, information and entertainment to Cuba, are lobbying Congress to establish affiliated television service. Congress last year appropriated $7.5 million in startup funds for proposed service, and in April, House approved legislation authorizing $16 million for operating funds in each of next two years. However, funds could not be appropriated unless President certifies to Congress that test of project, and one is planned for later this year, has demonstrated its feasibility.

Administration plans for TV Marti may have suffered serious setback by Cuba's decision to begin operating channel 13 in Havana. Channel 13 was frequency on which U.S. intends to operate TV Marti. It was said to be only one on which operation would not interfere with service by Cuban or American stations. Meanwhile, Cuban officials are threatening unspecified reprisals if U.S. proceeds with TV Marti project.

Wireless Cable

Wireless cable is up and running in several markets and may be in several more within next year.

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■ **July 26**—"Growth, Trends and Opportunities in Cable Advertising Sales," sponsored by *Women in Cable*. Panelists: Diane Weingart, USA Network; Stacie Raiff, Cable Network Inc., and Kay Delaney, CNN. Museum of Broadcasting, New York. Information: Information: Audrey Fontaine, (212) 557-6524.

July 27—Broadcast opportunity conference, co-sponsored by *Minority Business Development Center, Broadcast Capital Fund* and *Interracial Council for Business Opportunity*, and underwritten by *U.S. Department of Commerce's Minority Business Development Agency*. Sheraton Memphis, Memphis. Information: Anna Johnson, (212) 779-4360.

July 27-29—*Louisiana Association of Broadcasters* radio-television management session. Bentley hotel, Alexandria, La. Information: (504) 383-7486.

July 27-29—*Idaho State Broadcasters Association* annual convention. Among speakers: National Association of Broadcasters President Eddie Fritts and Westwood One President Bill Battison. Sun Valley, Idaho.

July 27-30—*Tennessee Association of Broadcasters* annual convention. Memphis.

July 28—Synditel, annual press preview of first-run TV programing held during annual *Television Critics Association* press tour. Century Plaza, Los Angeles. Information: Brett Holmes, (213) 653-3900.

July 28-30—*North Carolina Association of Broadcasters* summer meeting. Radisson, Myrtle Beach, S.C. Information: (212) 821-7300.

July 31—10th annual radio script contest, sponsored by *Midwest Radio Theater Workshop*. Information: (312) 874-1139.

August

Aug. 1—Deadline for television programs and music video entries in International Film & TV Festival, sponsored by New York Festivals. Information: (914) 238-4481.

■ **Aug. 2**—"Showtime Dealer College," workshop sponsored by *Showtime Satellite Network*, during SBCA/STTI national satellite television convention. Opryland hotel, Nashville. Information: Carol Dalgish, (212) 708-1667.

Aug. 3-5—*Michigan Association of Broadcasters* annual convention. Shanty Creek Resort, Bellaire, Mich.

Aug. 4—Deadline for entries in 24th annual Gabriel Awards, honoring "excellence in broadcast programs which serve listeners through the positive, creative treatment of issues of concern to humankind," sponsored by *Unda-USA, National Catholic Association for Broadcasters and Communicators*. Information: (513) 429-2663.

Aug. 5-7—55th annual *Georgia Association of Broadcasters* convention. Callaway Gardens, Ga.

Errata

In **Arbitron** May market-by-market **sweeps** report (BROADCASTING, June 26), **correct numbers for Burlington, Vt.-Plattsburgh, N.Y.**, households in total survey area should have been **ABC 12,000, CBS 38,000, NBC 33,000.**

Aug. 6-8—*Cable Television Laboratories* first technical planning seminar, "Fiber Optics: Strategy, Tactics, Implementation." Clarion hotel, Boulder, Colo. Information: (303) 939-8500.

Aug. 10-13—*Association for Journalism and Mass Communication* convention. Washington. Information: Ken Keller, (618) 536-7555.

Aug. 10-13—*North Carolina Cable Television Association* annual meeting. Pinehurst hotel and country club, Pinehurst, N.C.

Aug. 11—Broadcast opportunity conference, co-sponsored by *Minority Business Development Center, Broadcast Capital Fund* and *Interracial Council for Business Opportunity*, and underwritten by *U.S. Department of Commerce's Minority Business Development Agency*. Washington Hilton, Washington. Information: Anna Johnson, (212) 779-4360.

Aug. 12—*Texas AP Broadcasters* seminar, "Covering East Texas." Holiday Inn Southeast Crossing, Tyler, Tex. Information: (214) 991-2100.

Aug. 15—Deadline for entries in Women at Work Broadcast Awards, recognizing "outstanding radio and television programing about working women's issues," sponsored by *National Commission on Working Women*. Information: (202) 737-5764.

■ **Aug. 15**—Deadline for entries in Media Awards for "portrayal of critical care nursing to public or to health care professionals in an accurate, realistic and meaningful way," sponsored by *American Association of Critical Care Nurses*. Information: (714) 644-9310.

Aug. 16-20—*National Association of Black Journalists* annual convention. New York Hilton and Towers, New York. Information: (703) 648-1270.

Open Mike

Counterpoint

EDITOR: I was disappointed by your editorial in the June 26, 1989, issue of BROADCASTING titled "Contortionist." We believe the true contortionists are those who try to read the financial interest and syndication rules' (FISR) flawed and antiquated definition of "network" in a way which conflicts with the purposes of the rule: fostering effective competition from new entrants like Fox Broadcasting Company.

We must compete with a lineup of weaker stations—87% are UHF, 75% have been on the air less than 10 years. As you know, the FCC's multiple ownership rules recognize as a matter of law that UHF stations are inferior, counting UHF stations at one half the value of VHF stations for the purposes of national coverage.

Even NBC Entertainment President Brandon Tartikoff called Fox "the coat hanger network"—a jab at our UHF station partners. He knows well the UHF handicap. In every one of the 13 markets that NBC has UHF affiliates and ABC and CBS have V's, NBC's ratings dominance is lost in the local market; the sign-on to sign-off cume of each of those 13 affiliates places them third.

We have less than 6% of the amount of programing of the networks—even at 15 hours, we'd have only 15%. We now take in 1.6% of the revenue split and have 6 of our 9 shows in the bottom 10 rated shows (on a Nielsen season-to-date basis)—with our two "hit" shows ranking 50th and 55th.

Under our proposed definition, if we ever do reach parity with the networks, we would expect to be regulated like them.

We think the American people deserve more choice than just whatever Messrs. Murphy, Tisch and Wright want to serve them up.

That won't happen if the networks' hordes of owned and operated lawyers and lobbyists succeed in their attempt to twist the meaning of FISR restrictions intended to promote diversity in order to stop Fox and other competitors. The result would leave the big three of competition to continue to dominate national broadcasting, program production and advertising time sales. That would be perverse.

By the way, two factual corrections: You never asked us if the Kid's Network was going to "circumnavigate" the rules. The fact is that we've never said those hours wouldn't be counted toward the 15. Moreover, Fox Television Stations Inc.'s acquisition of midday game shows doesn't deserve the hype it has gotten, let alone the accusation that it is FBC product in disguise. *Jamie Kellner, president, Fox Broadcasting Co.*

Editor's note. *The editorial observation about Fox's planned children's programing block that Kellner disputes was based on the observations of other executives involved in the planning of the Kid's Network, who indicated FBC's position was that those hours of programing would not count, officially, as network hours. In a follow-up conversation last week, Kellner said the company has not decided one way or the other on the issue and may not until the matter comes to a head.*

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manager of WJBK-TV Detroit, is taking *Downey* off the air, perhaps as early as this week. The station, which moved the show from 10 a.m. to 4 p.m. to 2:30 a.m., is letting the show go because "it got some attention, but went the wrong way."

Jim Gabbert, owner of San Francisco's KOFY-TV, said he is "ambivalent" about renewing the show's contract, which is up in September. Al DeVaney, general manager of WPWR-TV Chicago, canceled the show in the first week of June, saying simply, "It's over."

As for Downey's potential distribution of the show, Kurlander "would look for that to happen," he said. "I would also look for him to have no success. If MCA decides to abandon ship, and I'm sure they will, they are not able to, should not and legally can't stand in his way of doing whatever he wants."

"I've been negotiating for four weeks so far," Downey said, with executives including MCA's Shelly Schwab and Quantum's Bob Pittman, "and it is going better than I wanted."

Downey's hoped-for "three-pronged situation" includes taking over ownership of the show from Quantum, buying back the outstanding shows MCA controls and making arrangements with MCA to distribute on his own or through a new distributor. "They're listening to me," Downey said. "We're in a very friendly position."

Downey also said he told the three companies that "I'm not going to do the show the way it's been done any longer, come hell or high water." Changes, which have already begun to take place, Downey said, include a little more humor, showing more sides of his personality and inviting fewer guests "who have to be beat up so I become a badnik too because I'm doing the beating up." He also wants to change the show from a daily to a weekly format. "I think that's where it belongs," he said, "weekly and late at night."

"There are no time periods that are really appropriate for a show like that on a weekly basis," Kurlander said, "and I don't see stations getting in bed with Morton Downey. I think he's sort of like leprosy; I wouldn't touch him."

According to Downey, "the show is a total consumer success, but not a commercial success. I can understand why a national sponsor would not want to go on every night, afraid that some guy was going to destroy something."

Should negotiations fall through, "I will do another show anyhow," Downey said. He has had several offers from "people who feel they can get national advertising by changing the situation here and there.

"The show can die," said Downey. "As long as they don't write my obituary with it, we're OK." **-RG**

CHR tops in top two

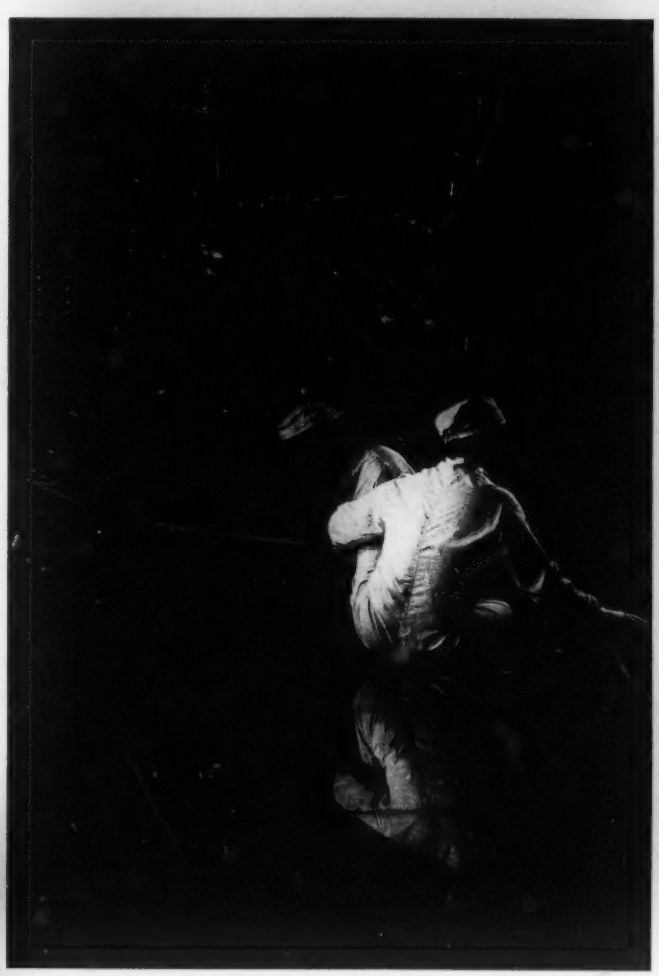
Just-released spring 1989 Arbitron ratings show CHR as the ruling format in the top two markets. In New York, long-time number one CHR outlet WHTZ(FM) regained its first-place status after losing in the winter books to easy listening simulcasters WPAT-AM-FM. Oldies outlet WCBS-FM increased its share from winter's 4.7 to 5.0, but was bumped from third place to fourth by rising adult contemporary WLTW(FM).

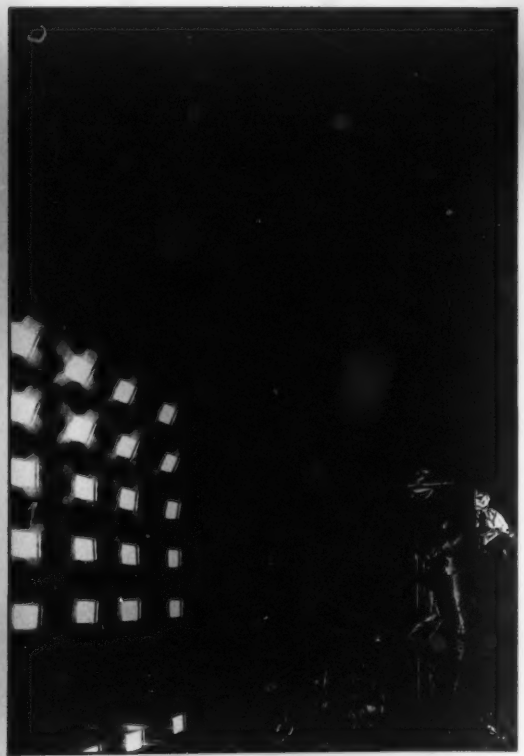
In Los Angeles, Scott Shannon's KQLZ(FM) made a jump from 13th (when still KIQQ[FM]) to a tie for fourth place. Spring 1989 is the first entire ratings period the Westwood One station has been on the air with the new call sign and its "free form rock 'n' roll hit radio" format. Emmis Broadcasting's CHR outlet KPWR(FM) retained the market leader position, but second place went to adult contemporary KOST(FM) and third to talk-formatted KABC(AM) and Top 40-formatted KIIS-AM-FM.

All results are based on the Arbitron spring 1989 radio local market report for the period beginning March 30 and ending June 21 (total persons, age 12-plus, average quarter hour shares, Monday-Sunday, 6 a.m.-midnight). Ratings data used are supplied by Arbitron and are copyrighted; they may not be reprinted or used in any form by nonsubscribers to the company's ratings service. An asterisk indicates a tie.

Station	Format	Spring 88	Spring 89
New York			
WHTZ(FM)	CHR	6.0	6.0
WPAT-AM-FM	Easy Listening	5.6	5.6
WLTW(FM)	Adult Contemp.	4.5	5.3
WCBS-FM	Oldies	4.2	5.0
WINS(AM)	News	4.0	4.7
WNEW-FM	AOR	3.6	4.2
WRKS(FM)	Urban Contemp.	4.6	4.1
WQHT(FM)	Top 40	4.1	4.0
WOR(AM)	Talk	4.6	3.7
WNSR(FM)	Adult Contemp.	2.9	3.5
Los Angeles			
KPWR(FM)	CHR	7.4	7.1
KOST(FM)	Adult Contemp.	4.6	6.1
KABC(AM)*	Talk	6.2	5.2
KIIS-AM-FM*	Top 40	6.5	5.2
KBIG(FM)*	Soft Contemp.	3.4	4.3
KQLZ(FM)*	Rock Hit Radio	2.4	4.3
KJOI(FM)	Easy Listening	4.2	4.1
KLOS(FM)	AOR	4.3	3.8
KNX(AM)	News	2.9	3.3
KRTH-FM	Oldies	3.7	3.1
Chicago			
WGN(AM)	MOR/Talk	9.0	9.1
WGCI-FM	Urban Contemp.	9.2	6.2
WBBM(AM)	News	5.7	5.3
WLUP-FM	Adult Rock	5.0	4.8
WVAZ(FM)	Black A/C	3.0	4.7
WXEZ-AM-FM	Easy Listening	5.2	4.5
WYTZ(FM)	CHR	3.5	4.4
WBBM-FM*	CHR	3.7	4.1
WCKG(FM)*	Classic Rock	4.4	4.1
WKQX(FM)	Adult Contemp.	3.0	4.0
San Francisco			
KGO(AM)	News/Talk	8.4	7.0
KMEL(FM)	CHR	5.7	5.6
KOIT-AM-FM	Soft Contemp.	4.5	4.9
KCBS(AM)	News/Talk	5.4	4.6
KABL-AM-FM	Easy Listening	6.2	4.5
KIOI(FM)	Adult Contemp.	3.6	3.9
KFRC(AM)*	Classic MOR	2.8	3.5
KNBR(AM)*	Adult Contemp.	3.6	3.5
KSAN-FM	Country	2.9	3.4
KRQR(FM)	AOR	2.9	3.0
Philadelphia			
KYW(AM)	News	6.9	7.1
WMMR(FM)*	AOR	7.8	6.9
WUSL(FM)*	Urban Contemp.	8.2	6.9
WEAZ-FM	Easy Listening	6.1	6.6
WEGX(FM)	CHR	7.0	6.1
WPEN(AM)	Nostalgia	6.3	5.8
WIOQ(FM)	CHR	2.5	4.8
WKSZ(FM)*	Soft Contemp.	5.5	4.6
WMGK(FM)*	Adult Contemp.	4.1	4.6
WYSP(FM)	Classic Rock	4.8	4.5
Detroit			
WJR(AM)	MOR/News/Talk	10.6	9.9
WJLB(FM)	Urban Contemp.	7.9	7.4
WJOI(FM)	Easy Listening	5.8	5.5
WDFX(FM)*	CHR	3.4	4.5
WWJ(AM)*	News	4.3	4.5
WCZY-FM*	CHR	4.6	4.3
WWWW(FM)*	Country	4.1	4.3
WLLZ(FM)	AOR	4.9	4.1
WHYT(FM)*	CHR	4.6	3.8
WNIC-FM*	Adult Contemp.	3.9	3.8
WRIF(FM)*	AOR	3.4	3.8
Boston			
WXKS-FM	CHR	8.6	7.7
WZOU(FM)	CHR	5.8	6.6
WRKO(AM)	Talk	7.7	6.5
WJIB(FM)	Easy Listening	4.9	6.3
WBZ(AM)	Adult Contemp.	6.6	5.9
WBCN(FM)	AOR	6.6	5.8
WMJX(FM)	Soft Hits	3.5	4.7
WHDH(AM)	Adult Contemp.	4.4	4.6
WSSH-FM	Easy Listening	4.3	3.9
WODS(FM)	Oldies	4.5	3.7

Satellites: Flying Toward the Future





Year of the satellite land rush

One year after the satellite operators promised they would launch no successor birds without commitments from the major broadcasting and cable networks, Hughes Communications, GE Americom and AT&T have them and are moving forward with the construction and launch of a new generation of satellites in the 1990's.

So far, programers have made down payments on 11 birds. With ABC on board, AT&T plans to launch two hybrid C-band/Ku-band satellites, the largest ever built for any user. GE is committed to launching at least three C-band birds (to be built by co-owned GE Astrospace engineers, pictured here working on two Satcom satellites) to accommodate a consortium of cable programers led by Viacom and is assembling another for Alascom.

Having pre-sold capacity to HBO and Turner Broadcasting System, Hughes will also launch three C-band cable birds, and is going ahead with two large hybrids to handle CBS's satellite traffic.

Higher construction, launch and insurance costs mean the new generation of satellites will not come cheap. At about $125 million for each C-band bird and $185 million for each hybrid, the three satellite carriers will spend at least $1.6 billion for those 11 television distribution satellites they now plan.

Two other satellites, GTE Spacenet's GStar IV and IBM's SBS VI, both of which will likely carry news and sports backhauls and private business traffic, are already scheduled for liftoff next year. How many of the

remaining 10 satellite applications now pending at the FCC (see chart, page 38) will eventually be launched remains to seen.

More deals will follow. Dozens of cable networks, syndicators, regional broadcasters and PBS have yet to say what they will do. NBC has several more years to decide. Additionally, private data and business television networks are springing up, and they may require as many as a dozen satellites in the next decades.

Knowing that the days of launches on speculation are now over, most providers and users predict a tighter market for occasional use and smaller syndicators. Some of the remaining operators—Western Union has dropped out and IBM has said it will follow—as well as some customers, may not survive. But for now, the next decade of network distribution has already begun to take shape.

Wheeling and dealing

By the end of 1993, the nine satellites now carrying the great majority of television and radio networks will run out of the fuel that keeps them in place and come to the end of their useful lives.

Because of the higher costs, as well as their experience with, in their opinion, too much unoccupied capacity, the operators made it known that they would not launch replacement satellites without the cost being shared up front by satellite users.

Moving expediently to acquire capacity in time to allow the two to three years needed to build and launch replacement birds, the big cable and broadcast programers entered negotiations last year, moving carefully, balancing affiliates' needs, costs, technological flexibility and the ability to call their own shots in the future.

Selling in-orbit real estate to cable programers is perhaps easier than filling a bird with broadcasters or private business networks. Extending the popular shopping mall metaphor, once an operator sells mall space to a Sears or Bloomingdales, thereby assuring customers will come, other retailers will clamor to acquire the remaining space. Although that "anchor tenant" model applies to broadcasters, a great portion of broadcast programing, including newsgathering, sports and syndication, requires space on an occasional basis. In cable, however, most of the retailers, wholesalers, really, are national 24-hour-a-day services in need of full-time space. Selling it to them, however, hinges on getting the anchor tenant.

When HBO and the Turner Broadcasting System teamed up to buy 10 to 14 transponders on Hughes's proposed 24 C-band transponder birds Galaxy IR and Galaxy V, the per transponder rate was in the $7 million neighborhood, according to several well-placed sources. Galaxy 5 and Galaxy 1R—to be launched in 1991 and 1993, respectively—will carry HBO, Cinemax, CNN, Headline News and TNT. The addition of ESPN means Hughes has secured the last of three programing legs—news (CNN), entertainment (HBO, TNT, USA, TNN) and sports (ESPN)—necessary to make the two satellites, in the words of ESPN senior vice president, affiliate sales and marketing, Roger Williams, "the premier cable birds of the 1990's."

If the HBO-Turner deal was for 14 transponders, Hughes gained $98 million from its anchor sale. The per transponder figure, however, said the sources, does not account for monthly $15,000-$30,000 per transponder protection payments—which might have been waived for the anchors—or about $1 million in launch protection. And other factors, such as options on new transponders for future additional services, may also fudge the numbers. But, in any case, the anchor deal revenue of less than $100 million is far short of the at least $350 million Hughes will spend to build and launch Galaxys IR and V and, a requisite part of the contract, in-orbit fleet spare Galaxy VI. Add Hughes marketing costs, and the figure moves toward half a billion dollars.

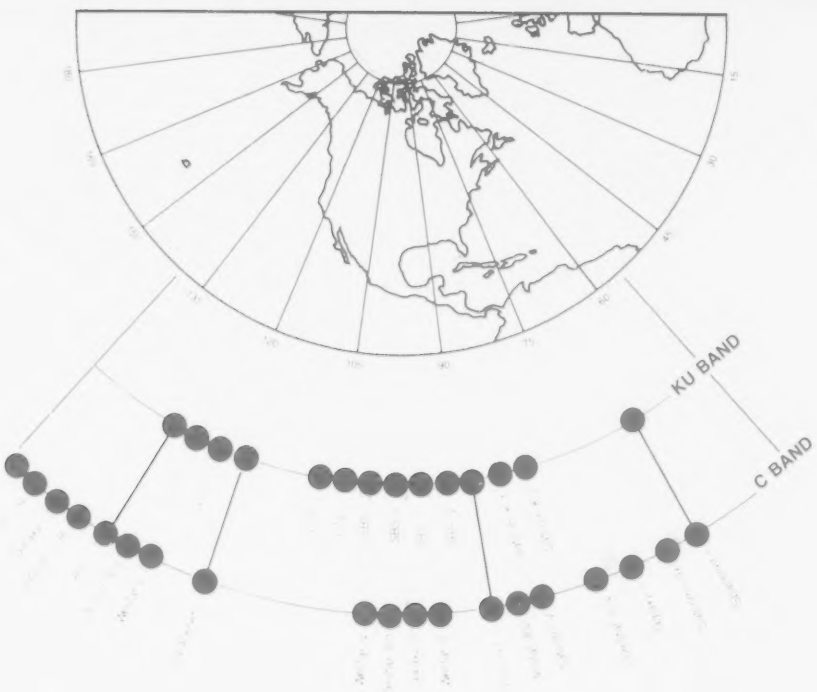
The operators make up the difference as they sign on other programers vying to join the must-watch anchors and fill up the remaining 34 transponders at higher rates. A second tier of major basic channels were said to pay closer to $10 million per transponder. If several of those, such as ESPN or The Nashville Network, purchased six transponders at that rate, Hughes made another $60 million—bringing revenue to a level still more than $200 million short of costs. A combination of latecomer buys and long-term leases, as well as up to $2 million-a-year short-term leases, could see the remaining 28 transponders go for an average of up to $18 million each. That would add $504 million to Hughes revenue on the three cable birds. The conjectural total of $662 million revenue, minus the $350 million to $400 million expenses, would leave Hughes with $262 million to $312 million profit over the 12-year life of the system.

Cable programers: Power in numbers

On the surface, the operators have appeared to hold all the cards—the wherewithal to build and launch satellites and their unanimous demand for prelaunch commitments. But both cable anchor deals resulted from powerful programers joining forces with other powerful programers to create these spacecraft "neighborhoods." The

GTE Spacenet's video control center where video traffic on all GTE Spacenet satellites is monitored

Satellite guide to the sky



Carrier Satellite	[1]C-band	Ku-band	Approximate end-of-life	Orbital slot
Alascom				
Aurora I	24		Jan. 1992	143
AT&T				
Telstar 301	24		Nov. 1993	96
Telstar 302	24		Sept. 1994	85
Telstar 303	24		Apr. 1996	125
Comsat				
Comstar I [2]	24		July 1986	76
Comstar IV	24		Feb. 1991	76
SBS III	—	10	Nov. 1990	99
SBS IV	—	10	Sept. 1991	97
Contel ASC				
ASC-1	18	6	Aug. 1995	128
GE Americom				
Satcom I-R	24	—	April 1993	139
Satcom II-R	24	—	Sept. 1993	72
Satcom III-R	24	—	Nov. 1991	131
Satcom IV	24	—	Jan. 1992	82
Satcom K-1	—	16	Jan. 1996	85
Satcom K-2	—	16	Nov. 1995	81
GTE Spacenet				
Spacenet I	18	6	May 1994	120
Spacenet II	18	6	Nov. 1994	69
Spacenet III	18	6	March 1998	87
GStar I	—	16	May 1995	103
GStar II	—	16	March 1996	105
GStar III [3]	—	16	Sept. 1994	125
Hughes Communications [4]				
Galaxy I	24	—	June 1993	134
Galaxy II	24	—	Sept. 1993	74
Galaxy III	24	—	Sept. 1994	93.5
Westar III	12	—	Aug. 1989	91
Westar IV	24	—	Feb. 1992	99
Westar V	24	—	June 1992	122.5
IBM [5]				
SBS IV	—	10	Aug. 1984	91
SBS V	—	14	Sept. 1988	122.5
MCI				
SBS III	—	10	Nov. 1982	95

C-band and Ku-band columns indicate numbers of transponders on each satellite. End-of-life estimates are based on launch date plus 10 years. Although Comstar II has passed its design end of life and gone into north-south drift, Comsat uses tracking antennas to maintain use of that bird. Imbalanced loading of fuel caused GStar III not to reach 125 degrees on schedule following September 1988 launch. Expending station-keeping fuel to move it there by next fall will reduce bird's design life by five to eight years.
[4] Hughes finalized purchase of Western Union Westar birds Jan. 20 and, by September 1988 agreement with IBM, markets capacity on SBS IV and V. Announced July 7, Hughes purchase of IBM holding company, Satellite Transponder Leasing Corp., and SBS IV, V and VI birds (SBS VI is scheduled to launch in June 1990) awaits FCC approval.

value of those programers to Hughes, measured by their ability to fill the remaining 30-some transponders with other programers vying to be "next door," surely gave them leverage in gaining extras, including nonpreemptible status, onboard backup transponders, in-orbit backup satellite access and options on expansion channels, if not also "sweetheart" prices on all of it.

"The number one question [other] programers have to face," ESPN's Williams told BROADCASTING, "is how to be on a satellite picked up by 100% of the cable industry." ESPN, USA Network and The Nashville Network have answered that question by also joining HBO and Turner on those birds. In addition to securing excess capacity, ESPN's purchase of four Galaxy transponders will improve its security: its main Galaxy I feed, "the second most preemptible feed on that bird," according to Williams, will become nonpreemptible on Galaxy IR.

But certainly, in cable, GE Americom will also remain a power. A 20-transponder deal with Viacom and other programers announced in February means GE will replace its current primary cable birds, Satcom FIIIR and Satcom FIV with Satcoms C-3 and C-4, both scheduled to launch in late 1992. Fleet spare Satcom C-1 will be launched in early 1991. Committed as a group to those birds are Showtime, The Movie Channel, MTV, VH-1, C-SPAN I, C-SPAN II, The Weather Channel and Lifetime. In a separate deal two weeks ago, CBN Family Channel purchased a transponder on each of those satellites.

Additionally, Americom expects to replace its Satcom FIR, a major carrier of regional cable and distant signal services; Satcom FIIR, filled now with government networks and broadcast syndicators, and its Ku birds, Satcom K-1 and K-2, which now carry NBC, private networks and may soon carry cable superstations. (On June 30, the ABC Network Radio—a customer which, like the other major radio networks, is now carried on FIR—purchased a transponder on Satcom C-5, to be launched in 1991. Again, because ABC Radio affiliates will have to point their dishes at C-5, other radio programers wanting to reach those affiliates will also want to fly on C-5. Therefore, ABC should prove to be an anchor for that bird in much the same way that Viacom and HBO-Turner are anchors for the cable birds.)

The Viacom deal was a coup for GE, in that they were regaining a customer lost to Hughes only two years before (BROADCASTING, March 2, 1987). On the other hand, negotiating singly, the top programers might have acquired only a handful of transponders at first-come prices. Instead, nearly 50% of the Satcom capacity was sold in the anchor deal, almost certainly an advantage for the Viacom group in pricing, and a trade-off perhaps worthwhile to Americom, which then had less real estate to sell.

If all 20 Satcom transponders sold for $7 million each, GE made more than Hughes for its anchor deal—$140 million—but left itself only 28 transponders, six fewer than Hughes, to sell at higher prices. Given revenue of perhaps $60 million for six $10 million channels and $396 million for 22 channels at $18 million each, GE Americom might make a $246 million profit—about $70 million less than Hughes—on $596 million revenue over the life of its $350 million three-bird system.

Although the HBO and Turner channels were sufficient to launch the Galaxy birds, number one basic programer ESPN may have gained its own leverage in a separate four-transponder purchase of Hughes capacity late last month (BROADCASTING, July 3). Its power lay in its ability to fill out the third leg of the entertainment-news-sports combination, assuring preeminence in markets ancillary to cable.

The ESPN purchase virtually assured that Hughes will also fly the number one bird for the satellite master antenna television (SMATV) hotel business. ESPN's survey of 10,000 SMATV headends found that 95% of them have only one dish, most pointed at Galaxy I—further evidence that the combination of HBO, CNN and ESPN on Galaxy IR also assures that Hughes will continue to operate the number one SMATV bird in the next decade.

But according to GE commercial operations senior vice president W. Neil Bauer, GE may actually gain the single-dish SMATV affiliates. The four primary cable birds in the next generation will, he predicted, "be located very closely in space, between 125 through 135. Even those areas that have one dish," he said, will be able to more easily shift from bird to bird using dual feed horns to preclude having to physically repoint antennas.

"We've done some work with vendors on what the pricing would be for those and what the feasibility is for going forward. We feel that there will be more use of [the dual feed horns] in the single-dish market in the future." GE does not believe a giveaway or mass purchase of the feed horns will be necessary. "We have enough dishes pointed at FIIIR right now so that we feel it's going to be very attractive anyway," said Braun. Also, noting that one form of protection that HBO already uses is to deliver feeds over both Hughes and GE birds, Bauer said that C-3 and C-4 may also carry HBO.

Since the Hughes and GE announcements of their anchor tenant deals, other programers have signed tentative "memoranda of understanding" with one or both of those operators, securing what many have described as "reservations." But as handshakes turn into firm contracts, the reservations become less real. "To any other programers still out there," said ESPN's Williams, "I suggest they act quickly."

One compelling reason for unsigned programers to move quickly, said Williams, is that the capacity on Hughes's two cable birds and GE's two cable birds—all four adding up to 96 C-band transponders—will fall short of replacement demand. Indeed, cable programers now occupy more than 120 transponders. GE's Braun conceded that marginal services could find themselves left out of the primary bird club. "There is an incentive for people to sign up early," said Braun. "People who come in early are going to get a better deal; sort of preconstruction pricing. But they will be accommodated one way or the other. We can use C-1 for additional capacity."

Future cable: room for growth

With next-generation deals all but settled, where does cable satellite delivery go from here? Growth in C-band demand in cable has also exceeded predictions, said Petrucci. The sources of continued growth, say both Hughes and GE, are the addition of new national cable channels, the addition of East and West Coast feeds and the launch of regional sports channels.

Examples of all three trends already exist. ESPN is an expansion case in point, moving from leasing three transponders full-time to buying four. To accommodate its need to carry simultaneous regional feeds of Major League Baseball next summer—three years before its Hughes transponders are placed in orbit—ESPN quietly acquired a fourth transponder on Galaxy III in May.

But until new birds are launched, HBO has been forced to drop its East (Combo) feed to make room for the launch of its new service, The Comedy Channel, later this year. The "HA" MTV Comedy Network will require capacity, as will the proposed Science Fiction Channel. And on July 7, when CBN Family Channel and The Nashville Network announced their respective deals with GE and Hughes, each said it would double its capacity to initiate feeds to both coasts.

Regional sports networks may have the easiest time coming on line. Independent of the need to be seen by every headend in the nation, most are carried via secondary cable birds, including Satcom FIR and FIIR and GTE Spacenet's Spacenet III. GE, said Bauer, has predicated much of its marketing plans for Satcom FIR and its replacement, C-1, on the growth of regional sports networks, such as those on the drawing board for Seattle and San Francisco.

On the national level, however, as the HBO combo drop suggests, options are more limited. The next generation of Hughes and GE cable birds will carry the same number of transponders carried by their current counterparts—96. And most of those are filled now.

However, noting continued channel capacity expansion at cable headends, GE's Braun said: "I don't think you'll ever see the speculative kinds of launches you saw in the '70s, but we don't think that satellites are going to be the stopper" to the growth cable services.

"We could bring another satellite, that's true," said his partner,

Bauer. "All our research indicates continued growth in the cable segment."

Network deals: Big bird is here

The industry rumor mill proved fickle and untrustworthy through last winter and spring. A prime example was the "reliable sources" that had both CBS and ABC buying capacity together on AT&T's future Telstar 401 and Telstar 402 birds in mid-May. Executives at both networks had previously spoken of the "synergies" in the networks using a common satellite system, and, because the relationships of both with AT&T had begun decades ago, the "known quantity" factor made reports of the deal unsurprising.

Other factors lent additional credence. Hughes Communications Inc. (HCI) had adamantly opposed launching hybrid satellites carrying both C- and Ku-band capacity—something the networks had from the beginning requested as a way to coordinate their Ku-band news and sports backhauls with C-band distribution on the same satellites. AT&T had said yes to this specification and proposed to launch the largest ever communications birds, each carrying 24 transponders in each band and capable of "cross-strapping," or transferring from one band to the other, aboard the spacecraft. And when the FCC last November assigned these birds to positions almost ideally suited to the networks' needs to regionalize feeds while also reaching affiliates in all 50 states, the tandem deal appeared inevitable.

But on May 24, CBS announced it would purchase 10 C-band and two Ku-band transponders on two future Hughes satellites, Galaxy VII and Galaxy IV, to be launched in 1992 and 1993, respectively. At least one of the Galaxys would be a hybrid as large as those proposed by AT&T. Given approximate $7 million per C-band transponder costs and closer to $10.5 million Ku-band prices, CBS might have paid $84 million for its capacity over the satellite's 12-year life. Although CBS's status as an anchor tenant sure to bring other broadcast TV programmers to the Hughes birds may have brought that price down, extras such as on- and off-board protection and cross-strapping expansion options likely kept the price near the $80 million level.

Two days later, ABC said it would purchase seven C-band and two Ku-band transponders from AT&T—a $70 million deal, based on the $7 million C-band and the $10.5 million Ku-band per-transponder rates. Hughes may apply to construct both its CBS birds as hybrids, according to HCI President Steve Petrucci. While the prospect of four birds carrying 96 transponders in each band has heartened those in the occasional use markets, many players and observers continue to express skepticism that sufficient commitments can be found to justify the launch of all four hybrids.

Did the investment in the Westar satellites carrying PBS, syndicated programming, sports backhaul transmissions and other broadcast television make it imperative that Hughes expand its noncable video business in the next generation? Unequivocally not, said Petrucci. The Westar purchase, approved by the FCC last November, "expanded what Hughes could do, not what it had to do," he said.

Be that as it may, at both Hughes and AT&T, proposals to launch two birds each for broadcasters does expand what each has to sell. "A significant number of television users remain in play and are being as heavily pursued by the vendors as were the anchor tenants," said AT&T Satellite Communications Director Karl Savatiel. Like the commercial networks, PBS, he said, could find a hybrid most attractive, partly for cross-strapping, in light of emerging proposals for increased public TV programing direct to school's requiring the smaller Ku-band dishes.

NBC broadcast operations Vice President David Baylor told BROADCASTING in late June that, when negotiations for next-

Proposed domestic satellites

These are the 23 new and replacement satellites proposed for launch in the 1990's.[1]

Carrier Satellite	[2]C-band	Ku-band	Orbital slot	Launch date	Customers uses
Alascom[3]					
Aurora II	24				
AT&T					
Telstar 401	24	24			
Telstar 402	24	24			
Contel ASC					
Contelsat I	12	12			
Contelsat II	12	12			
GE Americom					
Satcom C-1	24				
Satcom C-3	24				
Satcom C-4	24				
Satcom K-1		24			
Satcom K-2		24			
GTE Spacenet					
Spacenet III	24				
Spacenet IV	24				
GStar III					
GStar IV					
Hughes[4]					
Galaxy V	24				
Galaxy VI	24				
Galaxy III	24				
Galaxy VII	24				
Galaxy IV	24				
Galaxy VIII	24				
IBM					
SBS V[5]					
National Exchange[6]					
Spotnet	12	12			
Spotnet	24				

Chart information is based on FCC and other applications among GE, AT&T and National Exchange as well as Hughes' application for 93, 127 and 135 degrees orbital. The chart is for construction and in no way implies that

[1] C-band and Ku-band satellites indicate numbers of transponders in each band. Dates are for construction and in-service permit.

[2] Ten of 24 transponders on GE Americom satellites will be C-band, with the remaining 14 dedicated to Alascom.

[3] Hughes intentions to launch Galaxy VII and IV, which are expected to be hybrid C/Ku-band configuration, are subject to FCC licenses to use Ku-band and C-band frequencies on its satellites.

[4] Hughes agreement to purchase two satellites from SBS was announced July 1 and awaits FCC approval.

[5] National Exchange's SBS-V will carry 16 split-band transponders.

generation capacity begin at his network, perhaps around 1992, a deal with co-owned GE Americom is no foregone conclusion. The only all-Ku-band network, NBC could find "synergies" in moving over to the Ku-band capacity on either the Hughes or AT&T hybrids.

Additionally, syndicators, such as Wold, Bonneville and Hughes Television Network (which issued a request for quotes some two months ago, according to one operator), uplinkers and newsgatherers are in the market for a large block of full-time capacity. "CNN, for example, even though Turner is going with Hughes for distribution, is looking for some backhaul capacity. Great American Broadcasting is another one, as well as IDB, HTN and Fox." Indeed, last winter Fox leased several transponders on Telstar 303 into 1995. But after the CBS surprise, few will give full weight to the incumbency factor.

Reports all winter and spring had GTE Spacenet in the thick of negotiations to win network distribution business. And, according to Spacenet President C.J. (Jerry) Waylan, his company is "still in the running" to win PBS, IDB and other large, long-term capacity sales. The hybrid Spacenet III, which was launched last year and should remain in operation into 1998, has taken on secondary cable programers, including Pro Am Sports in Detriot, and backyard dish distributors, including United Video. It has, however, landed no national cable or broadcast 'anchor' tenants for future birds.

GTE, said Waylan, will "continue to compete on the fringes of the video market," providing Ku-band backhaul capacity and coordination services, while predicating its continued business on a mix of broadcast and nonbroadcast markets.

Satellite operators: Hughes out front

General Motors subsidiary Hughes Communications is taking the businesses of satellite construction and operation seriously. HCI is now having five satellites built for it by co-owned Hughes Aircraft's Space and Communications Group. And HCI has also been shopping elsewhere. Last January, Western Union exited the market, selling its three in-orbit Westar C-band satellites to Hughes, which said it needed them because all the capacity on its Galaxy I, II and III satellites was filled.

The Westars would serve to hold new customers until new and work Systems (once Maycom, purchased by Hughes Aircraft in 1987). As of late June, said Petrucci, SBS IV was essentially 100% occupied, and SBS V was about 50% filled. And the SBS capacity will also be marketable to "broadcasting, newsgathering and backhaul transmission applications."

If approved, the purchase would give Hughes its first Ku-band capacity and the largest domestic satellite fleet ever, comprising three Ku and six C-band birds. Although the usefulness of 12-transponder Westar III is marginal—at 10 years old, it has begun to drift in and out of orbit—another Hughes C-band bird, Galaxy VI, with 24 transponders will be launched next June. If Hughes's next-generation plans materialize completely, that fleet of nine could reach 10 by 1994: five C and three Ku-band birds (or their replacements) and two C-Ku hybrids.

In the past seven months, Hughes has increased its in-orbit fleet by five birds, sold transponders on its future cable birds to HBO, Turner Broadcasting and ESPN, and unexpectedly won CBS business from AT&T. And its business is no longer limited to this continent. Already 80% owner of United Kingdom DBS permittee Atlantic Satellites in Ireland, it also became one-third equity partner in Japan's first commercial satellite company, JCSAT, which will have two birds in orbit by October.

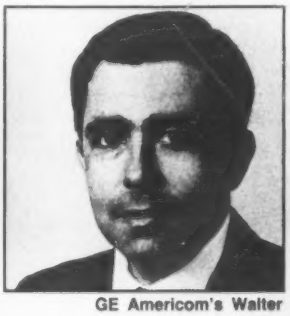
Hughes Aircraft, according to Petrucci, "did about $1.5 billion worth of business last year, roughly half of it military business. Hughes Communications' percentage of the commercial half of its manufacturing sister company's business "goes up and down." This year, it is most certainly up: it is building five HC birds. It is also refurbishing Westar VI, built about two years ago, he said, to be launched next year as the next system in-orbit backup, Galaxy VI. So successful has Hughes Aircraft been at marketing its workhorse, the HS 376, that all three Western Union Westar birds acquired last year by Hughes Communications, as well as the SBS IV and V satellites now marketed by Hughes, are that bus. SBS VI, which Hughes will also market after it is launched late next year, is an already built 376.

GE Americom: Taking risks and holding ground

Only two of the satellite operators are owned by companies that also build satellites—Hughes and GE Americom. Whether both may have been able to offer the best prices because of that advantage is known to only a handful of insiders. But it is clear that the

Hughes's Steve Petrucci

GTE's Jerry Waylan



GE Americom's Walter Braun and W. Neil Bauer

replacement Galaxy birds are launched, beginning in 1991, when Hughes sends up Galaxy VI (formerly Westar VI), which Hughes purchased from its original insurer. Additionally, the purchase might give Hughes a leg up in selling future capacity to current Westar customers, including PBS and dozens of state and regional broadcasters.

Seven month later, on July 7, Hughes announced its agreement with IBM to buy 100% of the stock of IBM holding company Satellite Transponder Leasing Corp. Pending FCC approval, three more birds, all Ku-band, will belong to Hughes: SBS IV and SBS V (in orbit and carrying 10 and 15 transponders, respectively) and SBS VI (a 19-transponder bird to be launched in December 1991). By an agreement in principle signed last September, Hughes already was to hold minority interest in STLC and has been selling SBS capacity to a burgeoning market of business TV and data customers, many of them supplied by manufacturer Hughes Net-

near western quarter of the domestic orbital arc will be filled with GE- and Hughes-built satellites carrying the cable neighborhood beyond the year 2000. Hughes Galaxys IR and V will fly at 133 and 125 degrees respectively, with in-orbit spare Galaxy VI nearby at 91 degrees; GE's in-orbit spare Satcom C-1 will fly at 137 and will be easily moved, without using much station-keeping life-of-the-bird fuel, given a launch or in-orbit failure for C-3 at 131 or C-4 at 135.

Although GE believes, said Bauer, that its C-3 and C-4 programer "neighborhood will be distributed to all of the cable headends," GE has had a tough year at the FCC—a year of risk-taking and repositioning that illustrates how easily regulatory uncertainty can translate into uncertainty in the marketplace.

When the commission issued orbital assignments for, and authorizations to launch, 19 fixed satellite service birds last November, GE was left out, having filed only two months before the report and

order (BROADCASTING, Nov. 21, 1988). Although the commission left GE's current slots unassigned and so apparently reserved for GE replacement birds, GE's application to launch a new 60 w Ku-band cable programing satellite, Satcom K-3, into the center of the orbital arc (at 85 degrees) was denied. Based on industry comments that such powerful birds would create frequency coordination and interference headaches, the FCC created two discrete segments at the far ends of the arc for such "high-power density" satellites—despite GE's protestations that no bird in the discrete segment could offer customers a 50-state reach.

The resulting lack of a 50-state assignment for K-3 constituted the last nail in the coffin for GE's Crimson Satellite Associates coventure with HBO that sought to bring cable delivery to Ku-band (see page 56). K-3 was sold to Luxembourg-based direct broadcast satellite operator Astra several months later. Americom is now negotiating to sell the other Crimson bird, Satcom K-4, to Intelsat, said Braun. Crimson is, after four years, being dissolved.

Forced in the 11th hour to come up with a new strategy, GE has this past spring gone through a series of applications to rearrange its orbital assignment scheme, including a failed competitive application for 93 degrees west longitude, from which it backed off early last month. Judging by reply comments to its latest proposal to fly Satcom C-3 and C-4 at 131 and 135 degrees, respectively, that regulatory battle may soon be settled. In the interim, however, GE lost a potential next-generation deal with PBS, which was not satisfied that GE had secured a 50-state slot (BROADCASTING, Feb. 13). And GE's unsettled assignment situation may have contributed to Hughes's winning HBO and Turner.

GE AstroSpace, which also builds satellites for government and commercial users at home and abroad, is currently working on two satellites for GE Americom. Satcom C-1, to be launched by Arianespace in the first quarter of 1991 as Americom's next-generation in-orbit spare, was built in 1981 along with Satcom IR, IIR and V (Aurora I). It is now undergoing refurbishment, which includes increasing transponder redundancy and doubling or tripling the systems that control the bird, according to Bauer. Satcom C-5, or Aurora II, will likely be launched by McDonnell Douglas, he said, adding that "the design process is underway" on the two next-generation cable birds, Satcom C-3 and C-4. Contracts have been signed to launch C-3 in September or October 1992, C-4 in November or December 1992.

New models: More power, redundancy, flexibility, longer life

The satellite operators and television have had a love affair ever since Home Box Office began distributing its pay movie service to cable systems via Western Union's Westar I in 1976. The operators love TV because a single customer requires an entire transponder, whereas it takes anywhere from 80 to 800 voice or data customers to fill an equal amount of capacity. The family of cable programers alone occupied in excess of 120 transponders on five birds during the past several years, and so have proved most coveted to Hughes Communications and GE Americom.

But as crucial as such customers are to the survival of each satellite operator, the programers have faced an equal risk. As noted by GE Americom senior vice president, government services and operations, Walter Braun: "A lot of people have their businesses riding on this. If your satellite goes out, you're out of business." The programers, he said, have proved "they know what they want, but they also have a lot more at stake. Now that you've got large, mature, high-profile businesses with large cash flows, you have more common sense and more business sense. You want to make sure that what you get is reliable."

Reliable and flexible they are, say the programers, rejecting speculation that fiber optic cable will soon bring television distribution back to earth. The networks' commitments to another generation of satellites has put off such a transition for another decade or more.

But according to GTE Spacenet President C.J. (Jerry) Waylan, "the entry fee" into satellite operation has increased "by a factor of two" over the past several years—an increase already being shared by the programers.

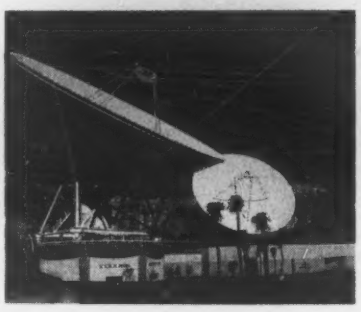
Getting satellites into operation has proved risky and expensive. When the Challenger shuttle exploded on take-off in 1986, NASA ceased taking commercial satellites into orbit. Since their own loss of an expendable vehicle that same year, Paris-based Arianespace has gradually taken up the slack, sending 22 birds into orbit between September 1987 and June 1989.

But the construction and launch of larger advanced satellites is costly.

According to applications at the FCC, Hughes has estimated that building, launching and operating one of its next-generation C-band birds for one year will cost $124 million; Alascom, which does not build its own birds, estimated the same endeavor would cost it $147 million; to build, launch and start up its two, 48-transponder Telstar 401 and 402 birds, AT&T expects to spend $489 million.

Although Ariane's streak has been encouraging, occasional losses still occur. Germany lost TV-Sat 1 in early 1988 because the satellite's solar array failed to deploy. GTE lost at least half the useful life of its GStar III last fall when fuel loaded out of balance kept it from reaching geostationary orbit. And only last month, India's Insat 1D was virtually destroyed in assembly. Consequent-

Florida Earth Station for Sale



GTE SPACENET CORPORATION offers for immediate service, lease, or purchase: Twin 32 meter wheel and track satellite antennas including entire Earth Station infrastructure on 80 acres of land located on the Florida Gulf Coast, north of Tampa.

Communications:

The 32 meter antenna is based on state-of-the-art Beam Waveguide design employing a wheel and track antenna mount and a step track antenna tracking subsystem. A four port C-Band linear feed assembly is used. Two redundant Aydin 3KW HPA's, up-converters and four redundant Lenkurt down-converters per antenna are available and can be readily switched into any configuration desired. All major Monitor and Control functions are centralized at the operations console.

Facilities:

A 500KW stand-by diesel generator and a 300KW UPS are utilized to provide a reliable power source for all critical/technical loads. A/C, water, sewage, security, Halon, lighting, and central air handlers constitute critical support elements needed to maintain the correct environment for reliable communications. The fenced-in grounds are landscaped and include a private fishing pond. The one story building contains 12,000+ sq. ft. of finished floor space with room to add a studio and/or other equipment. The entire facility can be operated and maintained by two technicians. See attached photograph.

Seller may consider ground lease of Earth Station site. Interested parties may arrange site visits and obtain additional technical information from:

Mr. Bill Patterson
Director, Network Operations
GTE Spacenet Corporation
1700 Old Meadow Road
McLean, Virginia 22102
(703) 848-0204

GTE Spacenet

ly, insurance is not cheap, having remained around 20% for the past year.

Advanced technology also adds to the cost. New satellite delivery applications are proliferating, exemplified by recent heavy investments in land mobile and aeronautical satellite ventures such as Geostar and the American Mobile Satellite Consortium, international separate systems such as PanAmSat and Orion and remote sensing satellites. The new applications call for new technologies, exemplified by NASA's Advanced Communications Technologies Satellite, which will employ a wide variety of bandwidths, spot beam transponders and other experiments in customized design.

But for the television and radio businesses, operators are, for the most part, refining and making more powerful the workhorse 36 mhz, C-band bird that has dominated the first generation.

The next-generation C-band birds will carry 16 w tube amplifiers driving 24 transponders. The higher power, say all industry sources, means a stronger signal and better picture, although most cable headends and TV stations are now equipped with dishes large enough to pull in a good picture from the current 8 w birds. New cable headends, however, may be able to save money in purchasing relatively smaller antennas in the future.

Additionally, the birds will carry second and third backup parts, and, thanks to improvements in batteries and fuel capacity and consumption, they are designed to last 12 years, two years longer than the current generation.

From a technological angle, latecomers to successor capacity dealmaking have less input into the design of the satellite. Although "satellites have never really been bought 'off the rack,' " said Braun, successor birds will be more customized than ever. Satellite procurement, he said, is "in a state of transition. To some degree, it was pretty much a standard design in the past, especially at C-band—pretty much 36 mhz and as much power as you could cram into the transponder—even though there were a lot of bells and whistles. GTE bought a certain kind of hybrid; Contel bought a certain design; we bought a certain design. For the more specialized applications in the future, I could see some custom tailoring."

Although the workhorse C-band will again rule the day, two new developments, high-definition television and the hybrid C-Ku spacecraft, will have far-reaching ramifications for the television industry.

In addition to flexibility factors like cross-strapping, the hybrid Telstars will offer more power—60-80 w in Ku-band—said AT&T Satellite Communications Director Karl Savatiel, "and the signal on the ground will be hotter. The affiliates will get better signal quality."

Like GE and Hughes, AT&T, said Savatiel, is also preparing for the potential introduction of HDTV some time after the launch of Telstars 401 and 402. Once in orbit, those birds' bandwidths will be switchable from the ground. Initially configured for 36 mhz video traffic, the transponders can accommodate an HDTV signal requiring 54 or 72 mhz.

On the potential for DBS, AT&T and GE appear to be on the same page: medium-power DBS first. "There are opportunities for communicating to antennas less than three-quarters of a meter off of these satellites. What we basically have is variable power. We can parallel two 60 w tubes into 120 w and enable us to get at least six, maybe 10, channels per bird, if that is what we want. We would have very little, if any, co-channel interference with adjacent satellites. We have demonstrated that to the FCC."

"Of course, if [DBS] takes off and really develops into a super market, then you have enough subscribers and enough revenue to go ahead and build a specialized bird." It is a market, he said, that broadcasters "ought to take a look at."

According to the FCC, AT&T has asked for an extension until fall on its deadline to begin building the new Telstars, at the same time offering assurances that the launch dates won't be affected.

When it comes to HDTV, all the operators are offering assurances that their satellites will be HDTV-ready, no matter what standard or standards are adopted by programers. Ku-band's higher power could make it the front-running medium—one factor contributing to the rise of the hybrid proposal. GE has performed HDTV transmission tests via Satcom K-1, working with the David Sarnoff Research Center on advanced TV. "The position for satellite operators has to be to make birds compatible with everything. [It is] largely an issue of power and bandwidth tradeoffs," said Braun, explaining that picture quality goes up as the square of the bandwidth, while it increases "only linearly with the power factor." Therefore, the GE birds will have flexible bandwidths.–PDL

The 1990's: when satellite supply should meet demand

Because programer commitments have indeed proved requisite in assuring that replacement and new satellites are launched by AT&T, Hughes and GE Americom, industry consensus is already fairly solid: the current surplus of capacity in both C and Ku bands will disappear early in the 1990's. With more advanced satellites being built, with construction and launch insurance rates running at about 20% of each bird's value, and without federal subsidy in the form of shuttle launches, no source could be found to predict anything but an upward push on costs to programers, whether in the forms of transponder purchases, long- or short-term leases or occasional time booking.

How far prices might go in forcing any satellite customers out of the market will depend largely on how many of the satellite operators remain in business, on whether each launches all the birds it now proposes and on how much demand for the same satellite capacity will continue to rise in nonbroadcast markets.

The number of birds actually launched and the kind of capacity carried on them could have wide-ranging ramifications for television users. GTE proposes a mix of new and replacement birds, including three hybrid Spacenets and three Ku GStars carrying a total of 66 C-band transponders and 114 Ku transponders. AT&T proposes hybrids totaling 48 transponders in each band. Hughes, in addition to launching its hybrids, also carrying 48 tranponders in each band, and a 24-transponder C-band fleet spare, could be flying an additional 43 Ku transponders aboard three SBS birds, if the FCC approves that purchase.

Many sources believe, however, that reality will fall short of current proposals. "I would say supply is still going to be tight," said AT&T Satellite Communications Director Karl Savatiel. "I don't expect to see a large surplus out there. I question whether it makes sense for all the current players to go forward after the mid-'90s. There may be further contraction" among operators, he said five days before IBM announced it would sell its satellite interests to Hughes. "The people who have the business needs of customers," said Savatiel, "are the ones that will go forward.

So far, commitments have apparently assured the launches of 10 satellites between 1991 and 1993 to serve cable and broadcast TV. In all cases, those "anchors" are expected to draw other programers to their adopted positions in the sky, selling out those satellites. But several sources expressed skepticism about whether all the operators will find sufficient commitments.

Shakeout: Fewer providers, fewer birds?

"Replacing satellites is a capital-intensive business. We're talking big money here," said Hughes President Steve Petrucci. GE Americom, GTE Spacenet, AT&T and Contel ASC, he said, "are large companies that could make the commitment if they wanted to. But all of those are companies that also have competing requirements on their funds internally. I'm sure the situation is different at every company, and that's what will determine who is in the business 10 years from now."

Like AT&T, and unlike Hughes and Americom, GTE is not a satellite manufacturer, and so, as one source put it, it has sold itself on service. Noting that the "entry price" into satellite operation is "up by a factor of two over the past five years," Spacenet President C.J. (Jerry) Waylan expects to see no more than "three

of a modern police station.

One aspect that seems to separate the manhunt shows from other reality programs is advertiser support. Advertising agency excutives suggested last week that neither *America's Most Wanted* nor *Unsolved Mysteries* is burdened with the "trash TV" stigma that has plagued some programs in the past season.

Earlier this year, ABC canceled two crime-related prime time specials, *Crimes of Passion II* and *Scandals II*, after receiving little advertising interest in the programs. Other programs have had trouble selling this season as well, such as Geraldo Rivera's prime time special on crimes related to satanic worship.

But the manhunt shows are perceived, and certainly pitched, as "pro-social," a term used by Ward Sylvester, who is partnered with Reese Schonfeld in Current Trends Productions, which is producing *Crime Watch* for Orion.

According to John Sisk, senior vice president, J. Walter Thompson, the manhunt programs are accepted by advertisers and evaluated primarily on their ratings performance. "I don't know how much of a plus we give them for the public service value," said Sisk. "But they certainly don't have the negative image that many of the so-called trash TV programs in syndication have been tagged with in the past season."

Both shows are solid ratings performers. *America's Most Wanted* is one of FBC's most popular programs, often beating NBC and ABC on Sunday nights. *Unsolved Mysteries* is usually first or second on Wednesday nights on NBC. *Crime Watch Tonight* doesn't air until the fall, but has been cleared by stations covering nearly 80% of the country, according to Robert Oswaks, Orion's vice president of advertising, publicity and promotion.

From the network standpoint, the two existing programs are extremely cost efficient. Linder said last week that each episode of *America's Most Wanted* costs about $150,000, a small sum compared to the $1 million and up it costs to produce a typical one-hour network drama. Sources put the estimated cost of *Unsolved Mysteries* at about $500,000 per episode, and noted the higher price tag for host Robert Stack as one reason for the cost. The production budget for the first season of *Crime Watch* exceeds $10 million, sources said.

The producers of all three programs suggest that the reason for their existence, and success, in the case of the two on the air, is, as Linder puts it: "Americans are fed up with crime." Linder said that the entertainment industry has inundated viewers with programs such as *Miami Vice* and *Wiseguy*, so that the concept of crime for many has become "some sort of amorphous dream. They [now] want the straight scoop."

John Cosgrove, who along with Terry Meuer produces *Unsolved Mysteries*, agreed that frustration with rampant crime in America is one reason for the success of the shows. "My feeling is it goes beyond that, though. We do stories from the standpoint of the people involved, who are very easy to relate to. People get caught up in the stories, and can imagine it happening to them. Under those circumstances, it's easy to care and to want to help."

According to Sylvester, *Crime Watch Tonight* "tries to tap into that same frustration." But with that program, the nightly fugitive profile will only be about three minutes long, with the rest of the half-hour focusing on developed news stories about different types of crime and the criminal justice process. There will also be tips on how to prevent crime or to avoid becoming a victim, said Sylvester.

Next season will be the second attempt to launch *Crime Watch*. Orion tried to launch the program in the 1987-88 syndication season but did not get enough station commitments. To some extent, Sylvester credits the tabloid show *A Current Affair* with demonstrating to stations that "a reality-based show could work in prime access."

While Americans have always been frustrated with crime, Linder said that 10 or 15 years ago manhunt shows would not have worked because of the poor image law enforcement had generally throughout society. "Ten or 15 years ago cops were 'pigs,' " he said. "And the name of the game was anti-establishment."

Law enforcement agencies see the programs as a way of capturing criminals for whom there are no other leads. "We've been very pleased," said FBI spokesman Rex Tomb. "They've helped us capture people we didn't think we had any probability" of apprehending. —SM

Week 42 delivers lowest numbers of 1988-89 season

Week 42 (ended July 9) delivered 24.7 million households, to date the lowest level of household viewership for the 1988-89 season. The ratings week closed out with NBC winning with a 10.1 rating and a 20.4 share. ABC came in second with an 8.8/17.7. CBS followed with an 8.4/16.9. In the evening news race, CBS won the week with an 8.5/20. ABC's *World News Tonight* came in second with an 8.1/19, followed by NBC's 7.9/19.

NBC's *Cheers* won the top spot for the week, garnering a 17.3/32. CBS's top slot was fifth place, held by a repeat broadcast of *Murder, She Wrote* (14.9/28). ABC took one slot in the top 10, eighth, with *20/20*'s 13.8/27.

Fox's top spot for the week came with the controversial premiere of *Totally Hidden Video* (see page 65). *Video* gave the network its highest rating ever, 10.8/20.

Nielsen	□	Net	□	Show
1	17.3/32	N		Cheers
2	16.9/30	N		Dear John
3	15.7/31	N		Cosby Show
4	15.5/30	N		Different World
5	14.9/28	C		Murder, She Wrote
6	14.3/31	C		60 Minutes
7	14.0/27	N		L.A. Law
8	13.8/27	A		20/20
9	13.5/29	N		Golden Girls
10	13.3/24	N		Night Court
11	13.3/26	N		Unsolved Mysteries
12	12.5/27	A		Full House
13	12.2/27	A		Roseanne
14	12.1/25	A		Mr. Belvedere
15	11.9/21	C		Jake and the Fatman
16	11.8/24	N		Knight and Daye, preview
17	11.4/20	A		ABC Sunday Movie
18	11.3/20	C		CBS Sunday Movie
19	11.0/22	A		Growing Pains
20	11.0/22	N		NBC Monday Movie
21	10.8/20	F		Totally Hidden Video
22	10.8/19	N		Seinfeld Chronicles
23	10.7/20	A		Just the Ten of Us
24	10.7/21	C		Designing Women
25	10.7/19	N		NBC Sunday Movie
26	10.6/21	A		Girl's Life
27	10.6/22	N		Hunter
28	10.1/20	F		America's Most Wanted
29	10.0/23	A		Perfect Strangers
30	10.0/18	F		Married...With Children
31	9.9/20	C		Murphy Brown
32	9.7/22	N		Amen
33	9.6/21	A		Wonder Years
34	9.5/21	N		ALF
35	9.4/22	A		Who's the Boss?
36	9.4/20	N		Hogan Family
37	9.3/17	A		China Beach
38	9.2/17	C		Wiseguy
39	9.2/17	N		Miami Vice
40	9.0/20	A		Coach
41	9.0/17	C		Equalizer
42	9.0/18	C		48 Hours
43	9.0/20	N		Matlock
44	8.7/17	A		ABC Monday Movie
45	8.7/20	N		Midnight Caller
46	8.7/21	N		My Two Dads
47	8.4/18	A		ABC Saturday Movie
48	8.3/17	C		CBS Friday Movie
49	8.2/16	C		Freedom Festival '89
50	8.2/18	N		In the Heat of the Night
51	8.0/17	A		MacGyver
52	7.9/13	A		Hooperman
53	7.1/16	C		Kate and Allie
54	7.0/15	C		Heartland
55	7.0/15	C		West 57th
56	6.9/12	A		Robert Guillaume Show
57	6.8/15	N		NBC Major League Baseball: Friday
58	6.7/15	C		Adventures in Babysitting
59	6.5/15	A		thirtysomething
60	6.2/12	A		ABC Thursday Night Baseball
61	6.1/11	C		Cavanaughs
62	6.1/12	C		Hard Time on Planet Earth
63	5.8/13	A		Incredible Sunday
64	5.7/13	A		Mission: Impossible
65	5.7/11	N		Magical World of Disney
66	5.6/12	F		21 Jump Street
67	5.5/12	C		CBS Tuesday Movie
68	5.5/10	C		Coming of Age
69	5.2/12	C		Paradise
70	5.1/11	C		Tour of Duty
71	5.0/10	A		Have Faith
72	4.9/12	F		Cops
73	4.8/8	F		Garry Shandling's Show
74	4.8/8	F		Tracey Ullman Show
75	4.6/10	N		Jim Henson Hour
76	3.9/9	C		CBS Summer Playhouse
77	3.8/8	F		Reporters
78	3.6/7	F		Duet
79	3.0/6	F		Beyond Tomorrow

* Nielsen syndicated weekly pocketpiece

Syndication Scorecard *

(Week ending June 25)

	Rtg.	Show	Stns.	Covg.
1	11.8	Wheel of Fortune, syn.	228	99
2	11.1	Jeopardy!	213	98
3	8.8	Cosby Show	198	97
4	8.3	Oprah Winfrey Show	217	99
5	7.5	Star Trek	213	94
6	7.0	Wheel of Fortune, wknd.	210	92
7	6.9	Fox Premiere Movie	139	89
8	6.5	Entertainment Tonight	169	94
9	6.2	Current Affair	147	91
10	6.1	Donahue	228	99
11	5.8	People's Court	186	92
12	5.1	Geraldo	200	99
13	5.0	Future Legends-Baseball	144	92
14	4.9	Star Search	151	95
15	4.8	War of the Worlds	217	95